

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

1 Manuel C Rodriguez (Estate) Case No. 05CEPR01418 Attorney Mortimer, Steven R (for Rogue Rodriguez – Administrator) Probate Status Hearing Re: Filing First Account/Petition for Final Distribution

		ROQUE RODRIGUEZ., son, appointed	NEEDS/PROBLEMS/COMMENTS:
		administrator with full IAEA authority	
		with bond set at \$22,500.00 on	OFF CALENDAR
		03/07/2006.	First Account and Final
Со	nt. from 110515	Letters issued on 03/16/2006.	Distribution filed 11/17/2015.
	Aff.Sub.Wit.		Hearing set for 01/20/2016.
	Verified	Inventory and Appraisal filed	
	Inventory	03/16/2006 shows an estate valued at \$22,500.00 consisting of real property.	Need First Account/and or
	PTC	\$22,300.00 Consisting of feat property.	Petition for Final Distribution or
	Not.Cred.	Order Confirming Sale of Real Property	current written status report
	Notice of	filed 08/06/2015.	pursuant to Local Rule 7.5 which states in all matters set for status
\vdash	Hrg	Minute Order of 00/0//2015 and this	hearing verified status reports
	Aff.Mail	Minute Order of 08/06/2015 set this Status Hearing for the filing of the First	must be filed no later than 10
	Aff.Pub.	Account/Petition for Final Distribution.	days before the hearing. Status
	Sp.Ntc.	, recessing termential bismediteri.	Reports must comply with the
	Pers.Serv.		applicable code requirements.
	Conf.		Notice of the status hearing,
	Screen		together with a copy of the Status
	Letters		Report shall be served on all
	Duties/Supp		necessary parties.
	Objections		riceessary parties.
	Video		
	Receipt		
	CI Report		
	9202	1	
\vdash	Order		Paviawad by 1\/
\vdash	Aff. Posting	4	Reviewed by: LV
	Status Rpt UCCJEA		Reviewed on: 11/03/2015 Updates:
\vdash	Citation		Recommendation:
\vdash	FTB Notice	-	File 1 - Rodriguez
	I ID NOIICE		ine i - kodiiguez

2

2 Ramona I. Jaramillo (Estate) Case No. 07CEPR00719 Attorney Tuttle, Ernest H., III (for Vanessa Jaramillo – Administrator with Will Annexed – Petitioner)

Petition for Termination and Discharge

DOD:	5/2/06	VANESSA JARAMILLO, Daughter and	NEEDS/PROBLEMS/
555.	<u> </u>	Administrator with Will Annexed with Full IAEA	COMMENTS:
		and bond of \$83,000.00, is Petitioner. (Appointed	
		9/18/07)	
			Note: The Ex Parte
		Petitioner states the only property that was in the	Petition for Final
	Aff.Sub.Wit.	estate was a single family residence located at	Discharge and Order is a
~	Verified	223 W. Locust in Pinedale, CA. The decedent left	Mandatory Judicial
	Inventory	the home by a holographic will to her three	Council Form
		children who were living in the home at the time	(DE-295). Therefore, the
	PTC	of her death.	Order has been
	Not.Cred.		interlineated to reflect
~	Notice of	An Inventory and Appraisal was filed listing the	that the Administrator will
	Hrg	value at \$195,000 on 2/8/08; however, within	be discharged upon the
>	Aff.Mail	months of filing the appraisal, the heirs	filing of this mandatory
	Aff.Pub.	discovered that the mortgage on the property	form.
	Sp.Ntc.	was much higher than expected. The lender	
	Pers.Serv.	served a Notice of Default and Election to Sell in	
	Conf.	the amount of \$7,570.82 and the roof needed to	
	Screen	be replaced. The roof leaked so badly that the	
.4		house eventually became uninhabitable. Also,	
~	Letters 1/25/	shortly after the I&A was filed, the real estate market crashed and the house was worth less	
	Duties/Supp	than the mortgage without regard to the roof.	
	Objections		
	Video	Petitioner states the heirs had minimum wage	
	Receipt	jobs at the time, had not completed college,	
	CI Report	and could not pay the mortgage, cure the	
	9202	default, replace the roof or pay the taxes. The	
>	Order	heirs lived in the property until it became	
	Aff. Posting	uninhabitable due to mold from the leaking	Reviewed by: skc
	Status Rpt	roof.	Reviewed on: 11/24/15
	UCCJEA		Updates:
	Citation	The County of Fresno eventually took the	Recommendation:
N/A	FTB Notice	property for failure to pay taxes and sold the	File 2 – Jaramillo
14//	I ID NOICE	house in March of 2015, tax sale deed recorded	The 2 - Jaianino
		4/28/15.	
		Potitionar praya:	
		Petitioner prays:	
		 For an order terminating further proceedings for the administration of the estate; 	
		For an order discharging Petitioner as a	
		personal representative of the estate; and	
		3. For such orders that the Court may deem	
		proper.	
<u> </u>		P. aka::	

Charles Lee Jefferson (Estate) Case No. 08CEPR00469

Attorney Fanucchi, Edward L. (for Wanda Foster – Administrator)

Probate Status Hearing Re: Filing First Account and or Final Distribution

DOD: 12/12/2006		WANDA FOSTER, was appointed	NEEDS/PROBLEMS/COMMENTS:
		Successor Administrator with limited	
		authority and bond set at \$245,700.00	Need First Account or Petition for
		on 10/22/2014.	Final Distribution or current written
<u> </u>	ont. from	=	status report pursuant to Local
	Aff.Sub.Wit.	Ex Parte Order Reducing Bond of	Rule 7.5 which states in all matters
-		\$245,700.00 to \$101,635.00 was filed 12/18/2014.	set for status hearing verified
	Verified	12/10/2014.	status reports must be filed no
	Inventory	Receipt of bond filed 02/04/2015.	later than 10 days before the
	PTC	=	hearing. Status Reports must
	Not.Cred.	Letters issued on 03/10/2015.	comply with the applicable code
	Notice of		requirements. Notice of the status
	Hrg	Final Inventory and Appraisal filed	hearing, together with a copy of
	Aff.Mail	12/12/2014 shows an estate valued at	the Status Report shall be served
	Aff.Pub.	\$102,700.00.	on all necessary parties.
	Sp.Ntc.	Minute Order of 10/22/2014 set this	orrain riceessary parties.
	Pers.Serv.	Status Hearing for the filing of the	
	Conf.	Petition for First Account and/or Final	
	Screen	Distribution.	
	Letters		
	Duties/Supp		
	Objections		
	Video]	
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		Reviewed by: LV
	Status Rpt		Reviewed on: 11/24/2015
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 4 – Jefferson

Conservator Franco, Albert (Pro Per – Co-Conservator – Petitioner)

Third Account Current, Report of Conservator and Petition for Its Settlement

DO	D: 8/15/13		ALBERT FRANCO, Son and Co-Conservator, is	NEEDS/PROBLEMS/
			Petitioner.	COMMENTS:
			Petitioner states that after their mother's death, Co-Conservator Patricia Leonard wanted him to take	Minute Order 10/15/15: Petitioner is informed
	nt. from 09171: <i>5</i> 15	5,	care of everything. He took over paying all bills for their mother's house in Fresno and has been dealing	that an amended petition needs to be
	Aff.Sub.Wit.		with this conservatorship. Ms. Leonard will not appear	filed. If filed two days
~	Verified		regarding this matter and when this conservatorship	prior to the hearing, no
	Inventory		is dissolved, Petitioner will be the one to petition the	appearance is needed.
	PTC		court for the probate estate.	As of 11/24/15, nothing
	Not.Cred.		Account period: 6/1/12 – 8/31/13	further has been filed.
	Notice of	Х	Accounting: \$121,910.31 / \$122,070.50	
	Hrg		(Accounting does not balance)	SEE ADDITIONAL PAGES
	Aff.Mail		Beginning POH: \$92,518.86 Ending POH: \$90,639.43	
	Aff.Pub.		Ending POH: \$90,639.43 (\$639.43 cash plus non-cash assets including real and	
	Sp.Ntc.		personal property)	
	Pers.Serv.			
	Conf.		Petitioner states the estate could not afford the cost	
	Screen		of an accountant as noted to this court and the prior court. Petitioner has provided the bank statements.	
	Letters		coon, i emioriei rias providea me bank siaiemenis.	
	Duties/Supp Objections		Petitioner waives compensation.	
	Video			
	Receipt		Petitioner states the conservators had on file a bond	
	CI Report		totaling \$181,280.00. After the prior accounting, the court stated the bond was no longer necessary and	
	9202		it was canceled.	
~	Order			
	Aff. Posting		Petitioner prays for an order that:	Reviewed by: skc
	Status Rpt		Notice of hearing on this account, report and	Reviewed on: 11/24/15
	UCCJEA		petition be given as required by law; 2. The Court make an order approving, allowing and	Updates:
	Citation		settling the attached account and report of the	Recommendation:
	FTB Notice		Co-Conservators as filed;	File 6 – Kozera
			3. Further, due to the fact that the Conservatee died	
			on 8/15/13, that the Court order this Conservatorship closed and dismissed.	
			Conservatorship closed and dismissed.	

Page 2 - NEEDS/PROBLEMS/COMMENTS:

- 1. Need amended accounting due to, but not necessarily limited to, the following issues:
 - Account does not balance. Charges and Credits should match.
 - Beginning Property On Hand does not correspond to the Ending Property On Hand figure from the Second Accounting.
 - Need mandatory schedules, including summary, receipts, disbursements, etc.
 - The Conservatee passed away 8/15/13. Therefore, this should be a third <u>and final</u> account, containing two account periods: one for the period until her death, and one for the subsequent period after her death. See Probate Code §2620(b).
 - Petitioner requests termination of the conservatorship, but does not request distribution of the assets or indicate whether an estate has been opened.
- 2. The Court may require the participation and verification of this account by Co-Conservator Patricia Leonard, as she has not formally been removed Co-Conservator.
- 3. Petitioner states the bond was canceled after the prior accounting because the court said bond was no longer necessary; however, the Order on Second Account filed 2/21/13 states the current bond of \$181,280.00 is sufficient. It does not cancel bond. Need clarification regarding the status of the bond.
- 4. Need Notice of Hearing.
- 5. Need proof of service of Notice of Hearing on <u>all</u> relatives at least 15 days prior to the hearing pursuant to Probate Code §§ 2621, 1460(b)(6).
- 6. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing pursuant to Probate Code §1252 on Attorney Leigh W. Burnside due to the Request for Special Notice filed 8/25/11.
- 7. Petitioner's Declaration re bank statements states that the conservatorship technically stopped when the Conservatee died and the probate estate started, and he will account for and deal with the probate estate assets when he files the probate case. He and his sister are the only heirs.

The above statement is not a correct representation of how to deal with the transition from conservatorship estate to probate estate. See above #1, and also Probate Code §§ 2620(b) and 2630 with regard to accounting for the period subsequent to the conservatee's death. Petitioner may wish to seek legal advice from an attorney regarding how to proceed.

7 Randi Taylour Robinson-Cervantes (GUARD/PE) Case No. 10CEPR00724 Attorney Kruthers, Heather H. (for Public Guardian – Guardian of the Estate)

Second Account Current and Report of Successor Guardian and Petition for Allowance

		PUBLIC GUARDIAN, Guardian of the Estate, is	NEEDS/PROBLEMS/COMMENTS:
		Petitioner. Account period: 6/12/13 - 6/30/15 Accounting: \$258,934.98 Beginning POH: \$246,598.13	Note: Elena K. Pena, Sister, is Guardian of the Person of Randi Taylour Robinson- Cervantes.
	Aff.Sub.Wit.	Ending POH: \$237,588.95	SEE PAGE 2
~	Verified	(\$31,906.47 cash plus an investment account)	
	Inventory	Public Guardian: \$1,362.00	
	PTC	(for 3.50 Deputy hours @ \$96/hr and 13.50	
	Not.Cred.	staff hours @ \$76/hr, itemized at Exhibit B.	
~	Notice of	Services include contact with annuity re	
	Hrg	distribution, contact with Ms. Pena re trip to	
~	Aff.Mail	Texas, consult with attorney re purchasing a	
	Aff.Pub.	vehicle) (See #2 .)	
	Sp.Ntc.	Attorney: \$1,250.00	
	Pers.Serv.	(less than local rule)	
	Conf.	,	
	Screen	Bond fee: \$1,187.96	
	Letters		
	Duties/Supp	Petitioner prays for an order:	
	Objections	 Approving, allowing and settling the account as filed; 	
	Video	Authorizing the Public Guardian's and	
	Receipt	Attorney's fees and commissions;	
	CI Report	3. Payment of the bond fee; and	
	9202	4. Other relief be granted that the Court	
~	Order	considers proper.	
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 11/24/15
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 7 – Cervantes

7 Randi Taylour Robinson-Cervantes (GUARD/PE) Case No. 10CEPR00724

Page 2

NEEDS/PROBLEMS/COMMENTS:

- 1. On 10/1/12, the Court authorized \$300/month for Ms. Pena for care of the minor. Disbursements Schedule indicates an increase to \$350/month in May 2014; however, Examiner is unable to locate an order authorizing this increase. The timing coincides with the authorization to purchase a vehicle, but the petition and order do not address increase. Need clarification.
- 2. On 4/23/15, the Court authorized investment of the minor's assets instead of holding the minor's funds in the Public Guardian's pooled trust account. This petition indicates gains of \$28.32 and losses of \$5,152.42 in the investment account, plus money management fees totaling \$1,437.91 for this account period. The Court may require clarification with reference to the best interest of the minor.
- 3. Also on 4/23/14, the Court authorized the Public Guardian to spend up to \$20,000.00 to purchase a vehicle to be used for the minor's benefit; however, it does not appear that any vehicle was purchased during this account period. The Court may require an update on the minor's situation.
- 4. Exhibit B indicates an <u>estimated 13</u> Staff hours @ \$76/hr for preparation of the <u>statement of services</u>. Is this a typo? If so, need recalculation of fees. If not, the Court may require itemization. (Note: For example, for the first account, this task was estimated at 1.5 hours.)

Note: If granted, the Court will set a status hearing for the filing of the next account as follows:

- Thursday, Sept. 1, 2016, if a one-year account is required; or
- Thursday, Aug. 31, 2017 if a two-year account is required.

8

Ramona Garcia (Estate) Case Janisse, Ryan Michael (for Joe Garcia, II – Administrator/Petitioner)

First and Final Report of Administrator on Waiver of Account and Petition for Final Distribution

DC	DD: 03/22/10	JOE GARCIA, II, Administrator, is	NEEDS/PROBLEMS/COMMENTS:
		Petitioner.	
			CONTINUED FROM 10/22/15
-		Accounting is waived.	Minute Order from 10/22/15 states:
<u></u>	ont. from 102215		The Petitioner might be allowed to
<u> </u>		1 & A - \$120,000.00	make monthly payments on fees;
✓	Aff.Sub.Wit.	POH - \$120,000.00 (no	the Court will inquire more on the issue.
	Verified	cash)	issue.
√	Inventory	Administrator- waived	
✓	PTC		Petitioner opened this matter
✓	Not.Cred.	Attorney - waived	with a fee waiver; filing fees are a
✓	Notice of		cost of administration. Petitioner
	Hrg	Distribution, pursuant to intestate	and others are receiving property
✓	Aff.Mail	succession, and the	from the estate, therefore filing
	Aff.Pub.	disclaimer/assignment of Joe Garcia, Sr., is to:	fees are due as follows: • Petition for Probate, filed
	Sp.Ntc.	31., 13 10.	02/07/12 - \$395.00
	Pers.Serv.	Joe Garcia, II- 1/3 interest in real	 Petition to Approve
	Conf.	property as tenant in common	Settlement Agreement, filed
	Screen		09/09/14 - \$435.00
	Letters 03/22/12	Crystal Garcia - 1/3 interest in real	Petition for Final Distribution, "In the 2011 (15 to 5.00). "The control of the 5.00 to 5.00. "The control of the 5.00. "The control of
	Duties/Supp	property as tenant in common	filed 09/11/15 - \$435.00 Total filing fees due: \$1,265.00
	Objections	Fernando Garcia - 1/3 interest in real	Total liling lees ave. \$1,265.00
	Video	property as tenant in common	
	Receipt	p. sp s, a.e .e	
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		Reviewed by: JF
	Status Rpt		Reviewed on: 11/23/15
	UCCJEA		Updates:
	Citation		Recommendation:
✓	FTB Notice		File 8 - Garcia

12 Barber L. Mardis (CONS/PE) Case No. 14CEPR00530 Attorney Bagdasarian, Gary G. (for Sharon Shrives – Conservator) Probate Status Hearing Re: Filing of the First Account

Age: 82	SHARON SHRIVES, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Conservator of the Person and of the Estate	
	on 09/25/2014 with bond set at \$40,000.00.	Need Inventory and Appraisal or
		current written status report
Cont. from	Letters issued on 09/25/2014.	pursuant to Local Rule 7.5 which
Aff.Sub.Wit.	Final Inventory and Appraisal filed	states in all matters set for status
Verified	03/05/2015 showing and estate valued at	hearing verified status reports must be filed no later than 10
Inventory	\$10,072.48.	days before the hearing. Status
PTC	Minute Order of 09/25/2014 set this Status	Reports must comply with the
Not.Cred.	Hearing for the filing of the First Account.	applicable code requirements.
Notice of		Notice of the status hearing,
Hrg		together with a copy of the Status
Aff.Mail		Report shall be served on all
Aff.Pub.		necessary parties.
Sp.Ntc.		
Pers.Serv.	 -	
Conf.		
Screen	 -	
Letters	=	
Duties/Supp	 -	
Objections		
Video		
Receipt	1	
CI Report	1	
9202	4	
Order	4	
Aff. Posting		Reviewed by: LV
Status Rpt	_	Reviewed on: 11/24/2015
UCCJEA	-	Updates:
Citation FTB Notice	=	Recommendation: File 12 – Mardis
FIB NOTICE		riie 12 - Marais

13 Fred Rowley (Estate) Case No. 14CEPR00742 Attorney Shepard, Jeff S. (for Raynette Grant – Executor) Probate Status Hearing RE: Filing of the First Account

DOD: 4/14/2014	RAYNETTE GRANT, Sister, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Executor with Full IAEA with bond of	
	\$60,000.00 on 9-25-14.	Need First Account or Petition for
	1	Final Distribution or current written
Cont. from	Letters issued 10-16-14.	status report pursuant to Local
Aff.Sub.Wit.	Final Inventory & Appraisal filed	Rule 7.5 which states in all matters
Verified	02/05/2015 shows an estate valued at	set for status hearing verified
Inventory	\$113,395.69.	status reports must be filed no
PTC	Receipt of Bond Increase to \$113,500.00	later than 10 days before the hearing. Status Reports must
Not.Cred.	filed 04/13/2015.	comply with the applicable code
Notice of	1	requirements. Notice of the status
Hrg	Minute Order of 09/25/2015 set this	hearing, together with a copy of
Aff.Mail	Status Hearing for the filing of the First	the Status Report shall be served
Aff.Pub.	Account.	on all necessary parties.
Sp.Ntc.		erramneedssary parmes.
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202	-	
Order		
Aff. Posting		Reviewed by: LV
Status Rpt	 -	Reviewed on: 11/24/2015
UCCJEA	 -	Updates:
Citation	 -	Recommendation:
FTB Notice		File 13 – Rowley

18A Guillermina Conde (CONS/E) Case No. 15CEPR00307

Petitioner Jackson, Martha (Pro Per – Conservator)

Probate Status Hearing Re: Filing of the Inventory and Appraisal

Age: 69	MARTHA JACKSON, Daughter, was appointed Conservator of the Estate	NEEDS/PROBLEMS/COMMENTS:
	only, without bond and all funds to be placed in a blocked account, on 06/30/2015.	18B is the Order to Show Cause set per minute order of 10/22/2015.
Cont. from 102215	Letters issued on 07/02/2015.	Minute Order of 10/22/2015: Martha
Aff.Sub.Wit.	Notice of Status of Hearing for the filing	Jackson is ORDERED TO PERSONALLY APPEAR or APPEAR by CourtCall on
Verified	of the Inventory and Appraisal was filed on 07/31/2015 and set this status	12/03/2015 at 9:00am to show cause
PTC	hearing.	as to why she should not be removed
Not.Cred.	Notice of Status of Hearing was mailed	as Conservator for not filing an Inventory and Appraisal.
Notice of	to Martha Jackson on 07/31/2015.	inveniory and Applaisai.
Hrg		Need Inventory and Appraisal or
Aff.Mail		current written status report
Aff.Pub.		pursuant to Local Rule 7.5 which
Sp.Ntc.		states in all matters set for status
Pers.Serv.		hearing verified status reports must be filed no later than 10
Conf. Screen		days before the hearing. Status
Letters		Reports must comply with the
Duties/Supp		applicable code requirements.
Objections		Notice of the status hearing,
Video		together with a copy of the Status
Receipt		Report shall be served on all
CI Report		necessary parties.
9202		
Order		Pariance d by a LV
Aff. Posting Status Rpt	-	Reviewed by: LV Reviewed on: 11/24/2015
UCCJEA	1	Updates:
Citation		Recommendation:
FTB Notice	1	File 18A – Conde
-		10 A

18A

18B Guillermina Conde (CONS/PE) Case No. 15CEPR00307
Conservator Jackson, Martha (Pro Per – Conservator)
Order to Show Cause

Aç	je: 69	MARTHA JACKSON, Daughter, was appointed Conservator of the Estate only, without bond and all funds to be placed in a blocked account, on 06/30/2015.	NEEDS/PROBLEMS/COMMENTS:
Co	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc.	Letters issued on 07/02/2015. Minute Order of 10/22/2015 set this Order to Show Cause. Minute Order states: Martha Jackson is ORDERED TO PERSONALLY APPEAR or APPEAR by CourtCall on 12/03/2015 at 9:00am to show cause as to why she should not be removed as Conservator for not filing an Inventory and Appraisal.	
	Pers.Serv. Conf. Screen Letters Duties/Supp	= = = =	
	Objections Video Receipt CI Report 9202	= = =	
	Order Aff. Posting Status Rpt UCCJEA Citation FTB Notice		Reviewed by: LV Reviewed on: 11/24/2015 Updates: Recommendation: File 18B – Conde

18B

19

Case No. 15CEPR00310

Petitioner

Howard Edward Fleming
Ferguson, Anita Marie (Pro Per – Fiancee – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to

Administer Under IAEA (Prob. C. 8002, 10450)

DO	D: 7/25/14		ANITA MARIE FERGUSON,	NEEDS/PROBLEMS/COMMENTS:
			named executor without bond, is	
			Petitioner.	Minute Order 10/22/15: Notice has to be
			Full IATA old	given to Anne Cortez. 12/3/15 will be the
Co	nt from 050715		Full IAEA – ok	last continuance.
	815, 081315,	•	Will dated 3/14/04	The following issue now exists:
092	2415, 102215		TVIII dated ey i iyo i	The following issue now exists.
~	Aff.Sub.Wit.		Residence: Fresno	1. Notice to Ann Cortez was mailed on
~	Verified		Publication: Fresno Bee	11/23/15, which is only 10 days prior to
	Inventory			the hearing. 15 days' notice is required
	PTC		Estimated value of estate:	by Probate Code §8110.
	Not.Cred.		Personal property: \$8,000.00 Real property: \$31,000.00	Note: This case was opened with a fee
	Notice of	Х	(\$55,000.00 encumbered for	waiver. Please note that upon distribution,
	Hrg		\$24,000.00)	all Court filing fees will be due.
	Aff.Mail	Х	,	
~	Aff.Pub.		Probate Referee: Steven Diebert	Note: If granted, the Court will set status
	Sp.Ntc.			hearings as follows:
	Pers.Serv.			Thursday, May 5, 2016 for filing the
	Conf.			Inventory and Appraisal
	Screen			, , , ,
>	Letters			Thursday, Feb. 2, 2017 for filing the first
>	Duties/Supp			account or petition for final distribution
	Objections			If the proper items are on file per Local Rule
	Video			7.5, the status hearings may come off
	Receipt			calendar.
	CI Report			
	9202			
~	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 11/24/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 19 - Flemming
				19

21A

In Re: Adrian Luis Barragan (SNT)

Case No. 15CEPR00562

Attorney Trustee Hurlbutt, James P. (for Gloria Ann Barragan – Mother and Conservator) Inland Counties Regional Center, Inc.

Probate Status Hearing RE: Filing Proof of Bond

	
	GLORIA
	a Petitio
	Pooled S
	On 9/3/1
Cont. from 101515	CENTER,
Aff.Sub.Wit.	the Adri
Verified	Trust on '
Inventory	
PTC	A Supple
Not.Cred.	8/25/15 totaling
Notice of	calculat
Hrg	interest,
Aff.Mail	\$180,400
Aff.Pub.	
Sp.Ntc.	At the he
Pers.Serv.	status he
Conf.	101 10/13
Screen	On 10/1
Letters	appeard
Duties/Supp	OSC as 1
Objections	as to the
Video	See Pag
Receipt	The minu
CI Report	attorney
9202	
Order	
Aff. Posting	
Status Rpt	
UCCJEA	
Citation	
FTB Notice	

GLORIA ANN BARRAGAN, Mother, filed a Petition for Creation and Funding of Pooled Special Needs Trust on 6/2/15.

On 9/3/15, **INLAND COUNTIES REGIONAL CENTER**, **INC.**, was appointed Trustee of the Adrian Luis Barragan Special Needs Trust on 9/3/15.

A Supplemental Declaration filed 3/25/15 stated the trust consists of assets totaling \$137,996.87 as of 8/1/15 and calculates bond including assets, nterest, and cost of recovery at \$180,400.00.

At the hearing on 9/3/15, the Court set status hearing for the filing of the bond for 10/15/15.

On 10/15/15, there were no appearances and the Court set an OSC as to the attorney re sanctions and as to the trustee re failure to post bond. See Page B.

The minute order was mailed to the attorney and the trustee on 10/15/15.

NEEDS/PROBLEMS/COMMENTS:

Update: Bond was filed 11/23/15. This matter was not taken off calendar due to the OSC at Page B.

Minute Order 10/15/15: Order to Show Cause issued for James Hurlbutt to show cause why you should not be sanctioned for Failure to Appear. Also Order to Show Cause to Inland Counties Regional Center to show cause why you should not be removed as trustee for failure to post bond. (See Page B re OSC)

Reviewed by: skc
Reviewed on: 11/24/15
Updates:
Recommendation:
File 21A – Barragan

21A

21B

Case No. 15CEPR00562

Attorney Trustee

In Re: Adrian Luis Barragan (SNT) Case No. 156
Hurlbutt, James P. (for Gloria Ann Barragan – Mother and Conservator)

Inland Counties Regional Center, Inc.

Order to Show Cause

	GLORIA ANN BARRAGAN, Mother, filed a Petition for Creation and Funding of Pooled Special Needs Trust on 6/2/15.	NEEDS/PROBLEMS/ COMMENTS:
Aff.Sub.Wit.	On 9/3/15, INLAND COUNTIES REGIONAL CENTER, INC. , was appointed Trustee of the Adrian Luis Barragan Special Needs Trust on 9/3/15.	Update: Bond was filed 11/23/15.
Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail	A Supplemental Declaration filed 8/25/15 stated the trust consists of assets totaling \$137,996.87 as of 8/1/15 and calculates bond including assets, interest, and cost of recovery at \$180,400.00. At the hearing on 9/3/15, the Court set status hearing for the filing of the bond for 10/15/15.	
Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen	On 10/15/15, there were no appearances and the Court set an OSC as to the attorney re sanctions and as to the trustee re failure to post bond. See Page B.	
Letters Duties/Supp Objections	The minute order was mailed to the attorney and the trustee on 10/15/15. Update: Bond was filed 11/23/15.	
Video Receipt CI Report 9202	Declaration of James P. Hurlbutt re OSC filed 11/23/15 states he failed to correctly note the deadline to file the bond in his file and also failed	
Order Aff. Posting Status Rpt	to advise the trustee of the Master Trust of the deadline. He also failed to calendar the review hearing on 10/15/15. Mr. Hurlbutt submits his sincere apology to the Court for his failure to	Reviewed by: skc Reviewed on: 11/24/15
Citation FTB Notice	adhere to the deadline and to appear. Mr. Hurlbut has now filed true and correct copies of the signed trust documents, the trustee's bond of \$180,400, and the inventory in the conservatorship matter 15CEPR00561.	Updates: Recommendation: File 21B – Barragan
	Mr. Hurlbutt states the assets of the conservatorship estate are still under the control of the conservator and arrangements are being made to distribute the assets to the trustee of the master trust in accordance with the court's order.	

Petitioner

Petition for Appointment of Guardian of the Person NO TEARCHARY IN BLACE: NEEDS / PROPLEMS / COMMENTS:

TEMPORARY DENIED ON 08/27/15 DUE TO NO APPEARANCES TESSIEJARRA MACK, paternal grandmother, is Petitioner. Aff.Sub.Wit. Aff.Sub.Wit. Portice PTC	Age: 1			NO TEMPORARY IN PLACE;	NEEDS/PROBLEMS/COMMENTS:	
TESSIEJARRA MACK, paternal grandmother, is Petitioner. Aff.Sub.Wit. Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of XHrg Aff.Pub. Sp.Ntc. Pers.Serv. Verified Consent & Waiver of Notice filed 11/18/15 Naternal grandfather: SMILEY MARTIN - Consent & Waiver of Notice filed 11/18/15 Naternal grandparents: UNKNOWN Petitioner states [see file for details]. Court Investigator Julie Negrete filed a report on 10/08/15. 1. Need Notice of Hearing. 2. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person of Consent & Waiver of Notice of Itea Person of Consent & Waiver of Notice of Itea Person of Consent & Waiver of Notice of Itea Person of Consent & Waiver of Duclearation of Duc Diligence for: a. Maternal grandparents - service by mail ok Court Investigator Julie Negrete filed a report on 10/08/15. Court Investigator Julie Negrete filed a report on 10/08/15. Reviewed by: JF Reviewed on: 11/23/15 Updates: Recommendation:				TEMPORARY DENIED ON 08/27/15 DUE	CONTINUED FROM 10/15/15	
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✓ Verified Consent & Waiver of Notice filed Inventory 11/18/15 PTC Mother: TRACEY MCBETH − Consent & Waiver of Notice filed 11/18/15 Notice of Hrg X Waiver of Notice filed 11/18/15 Notice of Hrg X Waiver of Notice filed 11/18/15 Aff.Mail X Paternal grandfather: SMILEY MARTIN − Consent & Waiver of Notice filed 11/18/15 Sp.Ntc. Pers.Serv. n/a Pers.Serv. n/a Petitioner states [see file for details]. Court Investigator Julie Negrete filed a report on 10/08/15. Video Receipt Corder Aff. Posting Status Rpt Aff. Posting Status Rpt Reviewed by: JF Reviewed on: 11/23/15 UCCJEA Citation Commendation:	Со		5		2. Need proof of service at least	
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Not.Cred. Notice of Hrg Paternal grandfather: SMILEY MARTIN − Consent & Waiver of Notice filed 11/18/15 Aff. Mail x		Inventory		11/18/15		
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Aff.Mail x Aff.Pub. Sp.Ntc. Pers.Serv. n/a ✓ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt ✓ CI Report 9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Citation Consent & Waiver of Notice filed 11/18/15 Maternal grandparents: UNKNOWN Petitioner states [see file for details]. Screen Court Investigator Julie Negrete filed a report on 10/08/15. Reviewed by: JF Reviewed by: JF Reviewed on: 11/23/15 Updates: Recommendation:		Notice of	Х		<u></u>	
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FTB Notice File 22 - Martin						
<u> </u>		FTB Notice			File 22 – Martin	

Armas, J. Todd (for Harvey A. Armas – Petitioner)

Status Re: Filing Heggstad Petition

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FTB Notice	

HARVEY A. ARMAS, Named Executor, filed a Petition for Probate of Will on 9/8/15.

At the hearing on 10/15/15, the petition for probate was not granted and the Court ordered that a Heggstad be filed (with regard to the decedent's trust).

The Court set this status hearing for the filing of such petition.

On 11/6/15, Petitioner filed a **Petition for** an **Order to Confirm Validity of Trust**; **Confirm Trustee**; and **Confirm Assets to Revocable Trust**, which is set for hearing on 1/6/15 in this estate matter.

However, the trust petition was filed into this estate matter, instead of being filed as a separate trust matter pursuant to Probate Code and Local Rules.

NEEDS/PROBLEMS/COMMENTS:

<u>Minute Order 11/12/15</u>: If the petition is filed properly at least two court days prior, then no appearance is necessary on 12/3/15.

As of 11/24/15, it does not appear that a new case has been filed as noted below.

 The petition filed 11/6/15 is in connection with the decedent's trust and as such must be filed separately from the estate. Therefore, this status hearing is not off calendar, because the petition was inappropriately filed in the estate case.

Need petition filed as new trust case. See applicable law re trusts (Probate Code §17000 et seq.) and Local Rule 7.1.2, which requires that trusts be filed separately from estates.

Reviewed by: skc
Reviewed on: 11/24/15
Updates:
Recommendation:

File 23 - Dostinich

33 Robert M. Thorpe (Estate)

Case No. 15CEPR01015

Attorney

Marshall, Jared C. (for Mennonite Brethren Homes, Inc. – Creditor – Petitioner)

Petition for Letters of Administration; Authorization to Administer under IAEA

DOD: 3/15/15			MENNONITE BRETHREN HOMES, INC.,	NEEDS/PROBLEMS/COMMENTS:	
			a creditor, is Petitioner and requests		
			appointment of the FRESNO COUNTY	continued from 11/19/1	_
			PUBLIC ADMINISTRATOR as	sue remains noted for I	reference:
Co	nt. from 111915		Administrator with Full IAEA without	Dalilianas is as assalita	
	Aff.Sub.Wit.		bond.	. Petitioner is a credito	•
-	<u> </u>		Full IAEA – ok	appointment of the P Administrator as pers	
Ě	Verified		TOILIALA - OK	representative; howe	
	Inventory		Decedent died intestate	decedent was surviv	
	PTC		Deceasin alea illiosiale	spouse and other far	•
	Not.Cred.		Residence: Reedley	who have priority of	
>	Notice of		Publication: Reedley Exponent	Petitioner does not a	
	Hrg			have declined or ref	used to act.
>	Aff.Mail	W	Estimated value of estate: \$0	Need declinations to	
~	Aff.Pub.			relatives pursuant to	Probate Code
	Sp.Ntc.		Probate Referee: Rick Smith	§8461.	
	Pers.Serv.			. Need Letters signed	hy Public
	Conf.			Administrator.	by I oblic
	Screen			7.4	
>	Letters			Note: If granted, the Court will set	
	Duties/Supp			status hearings as follows:	
	Objections			Thursday May E 201	/ for filing the
	Video			Thursday, May 5, 201 Inventory and Appra	_
	Receipt			inveniory and Appro	isai
	CI Report			Thursday, Feb. 2, 201	7 for filing the
	9202			first account or petiti	_
>	Order			distribution	
				If the proper items are filed prior to the status dates pursuant to Local Rule 7.5, the status hearings may come off calendar.	
	Aff. Posting			Reviewed by: skc	
	Status Rpt			Reviewed on: 11/24/15	
	UCCJEA			Updates:	
	Citation			Recommendation:	
	FTB Notice			le 33 – Thorpe	
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